

FEB 04 2008

Application No. 09/706,101
Filed: November 3, 2000
TC Art Unit: 3626
Confirmation No.: 5846

AMENDMENT TO THE CLAIMS

1. (Currently Amended) A system for creation of a certificate of insurance ~~and preventing that prevents~~ creation of an unauthorized certificate of insurance, ~~relative to on behalf of~~ an insured party, ~~for by~~ a third-party requester, ~~which is one or more of the insured, a certificate holder or others acting on behalf of an insured or certificate holder,~~ comprising:

a database storing insurance coverage information about each of a plurality of ~~insured parties~~ insureds; and

a computer system communicably coupled to the database, the computer system ~~including comprising~~ computer program instructions to:

(a) provide a first user interface under control of a first user, ~~which is one or more of an insurer, an insurance agent or broker acting on behalf of the insurer, or an insured authorized by the insurer or by the insurance agent or broker acting on behalf of the insurer,~~ to accept, from the first user, an insured name and address, ~~restriction criteria including insurance policy details, and certificate wording allowed and or disallowed to prevent unauthorized insurance coverage information from being included in the certificate of insurance and access identification of one of the plurality of insured parties;~~

(b) provide a second user interface for the third-party requester to select a specific insured ~~by the access identification and specify~~ provide a certificate holder name, address and certificate purpose ~~insurance coverage information relative to the specific insured to be provided in the certificate of insurance, as restricted;~~

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(c) restrict the certificate holder name, address and certificate purpose provided by the third party in accordance with the restriction criteria entered in the database by certificate wording allowed or disallowed accepted from the first user to prevent inclusion of unauthorized insurance coverage information, including the disallowed certificate wording; and

(d) create the certificate of insurance based on with the specified insurance coverage information, insured name, address and insurance policy details accepted from the first user, and the certificate holder name, address and certificate purpose provided by the third party, as restricted in accordance with the restriction criteria certificate wording allowed or disallowed entered in the database by the first user; and

(e) provide the certificate of insurance to the certificate holder.

2. (Canceled)

3. (Currently Amended) The system of claim 1, wherein the computer system further comprises:

computer program instructions operable to:

accept from the first user database is operable to store information about an approver to be notified and an approval process to provide notification to the approver when the third-party provides certain input data comprising certain selections through the second user interface; approving party corresponding to at least a subset of the insurance coverage information corresponding to the insured; and

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the computer system is further comprising computer program instructions operative operable to:

send an electronic message to the approving party approver prior to creating the certificate of insurance when the third-party provides the certain input data;

permit the approver to edit the certificate of insurance; and indicate approval of the certificate of insurance whereby creation of an approved certificate of insurance is permitted.
~~the electronic message including at least a portion of a proposed certificate of insurance, and to create the certificate of insurance depending on receipt of an approval response from the approving party.~~

4-5. (Canceled)

6. (Currently Amended) A method for creation of a certificate of insurance ~~and preventing that prevents~~ creation of an unauthorized certificate of insurance, ~~relative to on behalf of an insured party, for by a third-party requester, which is one or more of the insured, a certificate holder or others acting on behalf of an insured or certificate holder,~~ comprising:

storing insurance coverage information corresponding to about each of a plurality of insured parties in a database insureds;

providing a first user interface under control of a first user, which is one or more of an insurer, an insurance agent or broker acting on behalf of the insurer, or an insured authorized by the insurer or by the insurance agent or broker acting on behalf of the insurer, to accept, from the first user, an insured name and address, insurance policy details, and +

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~~accepting, from the first user, an identification of one of the insured parties and restriction criteria including insurance policy details, certificate wording allowed and disallowed to prevent unauthorized insurance coverage information from being included in the certificate of insurance and access identification of one of the plurality of insured parties;~~

providing a second user interface that is accessible by a for the third-party to select a specific insured and provide a certificate holder name, address and certificate purpose; requester;

restricting the certificate holder name, address and certificate purpose provided by the third party in accordance with the certificate wording allowed or disallowed accepted from the first user;

~~accepting the access identification of the one of the plurality of insured parties from the third party requester via the second user interface;~~

~~permitting the third party requester to specify insurance coverage information relative to the one of the plurality of insured parties to be provided in the certificate of insurance as restricted in accordance with the restriction criteria entered in the database by the first user to prevent inclusion of unauthorized insurance coverage information, including the disallowed certificate wording; and~~

creating the certificate of insurance based on the specified insurance coverage information with the insured name, address and insurance policy details accepted from the first user, and the certificate holder name, address and certificate purpose provided by the third party, as restricted in accordance with the

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~~restriction criteria entered in the database by the first user.~~
certificate wording allowed or disallowed; and
providing the certificate of insurance to the certificate
holder.

7. (Canceled)

8. (Currently Amended) The method of claim ~~7~~, 6, further comprising:

accepting from the first user storing information about an
approver to be notified and an approval process to provide
notification to the approver when the third-party provides certain
input comprising certain selections through the second user
interface~~approving party corresponding to at least a subset of the~~
~~insurance coverage information corresponding to at least one of~~
~~the plurality of insured parties;~~

sending an electronic message to the approving party approver
prior to creating the certificate of insurance when the third-
party provides the certain input;

permitting the approver to edit the certificate of insurance;
and

indicating approval of the certificate of insurance whereby
~~the electronic message including at least portion of a proposed~~
~~certificate of insurance; and~~

~~creating the~~ creation of an approved certificate of
~~insurance depending on receipt of an approval response from the~~
approving party is permitted.

9-14. (Canceled)

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15. (Currently Amended) The method of claim 6, further comprising:

accepting from the first user sentence portions or sentences for selection by the third-party to provide additional insurance policy details; and

~~, after the step of accepting the access identification of the one of the plurality of insured parties from the third-party requester via the second user interface;~~

~~receiving proposed text to be entered into a remarks box within the certificate of insurance to be created;~~

~~— forming a complete sentence reflecting the proposed text as restricted in accordance with the restriction criteria entered in the database;~~

~~— entering the complete sentence into the remarks box within the certificate of insurance to be created;~~

permitting the third-party to select the sentence portions or sentences to be provided while preventing the complete sentence from being modified by the third-party from editing the sentence portions or sentences. requester; and

~~— creating the certificate of insurance including the complete sentence as restricted in accordance with the restriction criteria entered in the database.~~

16-26. (Canceled)

27. (Currently Amended) The system of claim 1, 19, wherein the computer system further comprises:

computer program instructions operable to:

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accept from the first user sentence portions or sentences for selection by the third party to provide additional insurance policy details; and

permit the third party to select the sentence portions or sentences while preventing the third party from editing the sentence portions or sentences. ~~construct a sentence by combining a number of predetermined phrases in response to selection through the second user interface of at least one insurance characteristic, wherein the sentence is entered in a text field appearing on a requested certificate of insurance.~~

28-38. (Canceled)